

STATE  
OF  
GEORGIA

# Application for DISPOSITION STANDARD

OFFICE OF SECRETARY OF STATE  
DEPARTMENT OF ARCHIVES & HISTORY  
RECORDS MANAGEMENT DIVISION

1. Application Date	INSTRUCTIONS: See separate instructions for completion of front and reverse of this form. Sign original and two copies and forward to Department of Archives and History, Attention: Records Management Officer.	FOR RECORDS MANAGEMENT DIVISION USE Date Received    Application No.    Date Completed MAR 22 1973    73-157-199    MAR 27 1973																	
2. Agency Application No.																			
3. AGENCY, Division, Subdivision & Administering Office Address Office of Planning and Budget Management Review Division 608 Trinity-Washington Bldg. Atlanta, Georgia 30334		4. Person to Contact Bill Roper																	
		5. Working Title Director of Management Review	6. Tel. No. 656-2191																
7. ACTION REQUESTED  <input checked="checked" type="checkbox"/> ESTABLISH DISPOSITION STANDARD; RECORD WILL CONTINUE TO ACCUMULATE. <input type="checkbox"/> DISPOSE OF PRESENT ACCUMULATIONS; NO FURTHER ACCUMULATION ANTICIPATED.																			
8. Earliest & Latest Dates of Series 1967 - to date		9. Exact Series Title MANAGEMENT REVIEW FILES SERIES (see separate titles)																	
10. What is the function of the office in which this record series is created The Management Review Division is responsible for providing a program of management review services. The division provides technical and managerial assistance to individual state agencies in the identification and solution of specific problems and the overall improvement of internal policies, organization, procedures, practices and controls; provides coordination and direction of special economy and efficiency studies involving the state government at large or any segment thereof; provides technical assistance to individual state agencies or groups of agencies in the study, installation, and utilization of electronic data processing systems; assists in the implementation of recommended improvements as requested or directed; assumes the responsibility for selected activities on a continuing basis; serves as the continuing Reorganization arm of the Governor to prevent proliferation of agencies, to improve and refine the reorganized structure and to maintain economies and efficiencies attained.																			
11. This file contains the following documents (include form numbers and titles, if any, and file arrangement):  <div style="text-align: center; padding: 20px;">SEE SEPARATE DESCRIPTIONS AND RECOMMENDATIONS</div>																			
ATTACH SAMPLES OF THE FILE																			
12. EQUIPMENT OCCUPIED	No. of Drawers	Cu. Ft. of Records																	
Letter-size File Drawers			ANNUAL RATE OF ACCUMULATION																
Legal-size File Drawers			Floor Space Occupied (Square Feet)																
			AVERAGE DAILY REFERENCES																
			<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="2">No. of Drawers</td> <td colspan="2">Cu. Ft. of Records</td> </tr> <tr> <td colspan="2">In Office(s)</td> <td colspan="2">In Storage Area(s)</td> </tr> <tr> <td>This Year's</td> <td>Last Year's</td> <td>Preceding Year's</td> <td>All Prior Year's</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> </tr> </table>	No. of Drawers		Cu. Ft. of Records		In Office(s)		In Storage Area(s)		This Year's	Last Year's	Preceding Year's	All Prior Year's				
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QUESTIONNAIRE Place an "x" in the proper column. If answer is "YES," please explain

YES NO

13. Is this the Record Copy of the series? ☒ [X] - ☐ [ ]
14. Is there a duplication of this series in another office or agency? ☐ [ ] ☒ [X]
15. Is the information contained in this series ever summarized or published? Attach copy of summary or publication. ☐ [ ] ☒ [X]
16. Does the series contain classified information requiring security handling? Some report information is confidential (10 years to OPB personnel only) ☒ [X] ☐ [ ]
17. Does the series initiate, amend or terminate agency policies and procedures? ☒ [X] ☐ [ ]
18. Could the function be performed if the files were lost or destroyed? ☒ [X] ☐ [ ]
19. Is the series (or major portion of it) regularly microfilmed? If yes, why? ☐ [ ] ☒ [X]
20. Does the record series provide data as input to an EDP file? ☒ [X] ☐ [ ]
- Occasionally some studies are used as EDP input
21. Does the record series contain documentation produced as EDP printout? ☒ [X] ☐ [ ]
- Occasionally some studies are used as EDP printout
22. Has the Federal Government issued instructions governing retention/disposition of these files? ☐ [ ] ☒ [X]
23. Will there be a need for these records 10, 15 years from now? If yes, what? historical value ☒ [X] ☐ [ ]

24. REQUIREMENTS. The following requires the files to be kept indefinite years:

- a. ☐ [ ] STATE LAW b. ☐ [ ] STATUTE OF LIMITATION c. ☐ [ ] AUDIT PERIOD d. ☐ [ ] FEDERAL LAW e. ☒ [X] ADMINISTRATIVE DECISION f. ☒ [X] HISTORICAL VALUE

(Cite Law, Statute, or other reason for the retention requirement)

Some series offer historical documentation of function of Management Review Division and its impact upon State government.

25. AGENCY RECOMMENDATIONS: This agency recommends that the file series be cut off at the end of each
- ☐ [ ] CALENDAR YEAR - ☐ [ ] FISCAL YEAR - ☒ [X] Other See attached recommendations then:
- ☐ [ ] Hold in the current files area \_\_\_\_\_ month(s)/ \_\_\_\_\_ year(s):
- ☐ [ ] Transfer to ☐ [ ] State Records Center ☐ [ ] Local Holding Area; hold \_\_\_\_\_ year(s):
- ☐ [ ] Destroy.
- ☐ [ ] Transfer to State Archives for permanent retention.
- ☐ [ ] Destroy immediately after cut-off.
- ☐ [ ] Other: (Specify)

(Indicate briefly rationale for recommendations above/or write additional remarks):

Attach Samples of the Series W. H. Roper

Records Management Officer

Date

26. Recommendations		<input checked="" type="checkbox"/> [X] Approved	<input type="checkbox"/> [ ] Disapproved	Head of Agency/Designee	Date
in Paragraph	State	<input checked="" type="checkbox"/> [X] Approved	<input type="checkbox"/> [ ] Disapproved	<u>William M. Dixon</u>	<u>3-23-73</u>
	Records	<input checked="" type="checkbox"/> [X] Approved	<input type="checkbox"/> [ ] Disapproved	<u>Carroll Hart</u>	<u>3-21-73</u>
	Committee	<input checked="" type="checkbox"/> [X] Approved	<input type="checkbox"/> [ ] Disapproved	<u>Robert A. Helle</u>	<u>3-26-73</u>

OFFICE OF PLANNING AND BUDGET  
Management Review Division

<u>Appl No</u>	<u>Description</u>	<u>Disposition</u>
73-197	MANAGEMENT REVIEW DIVISION SUBJECT FILES - Documents relating to the operations of Management Review services. Included are correspondence, memoranda, directives between the Division Director and in- ternal agency personnel, the Governor, other state officials; policies and procedures proposals and directives; lists and resumes of qualified consultants in various management fields - among others. The series is arranged by subject, not necess- arily alphabetically.	Cut off at the end of each fiscal year; hold in Current Files Area 2 years; retire to State Archives.
73-198	MANAGEMENT REVIEW REPORTS AND RECORD SET FILES - Documents relating to the data generated by Management Review personnel as they analyze and solve systems problems for agencies. Included are one or more copies of reports concerning individual management problems of various agencies/ programs. Also included are working papers such as raw statis- tical data, worksheets, report drafts, graphs, charts, documents outlining procedures for implement- ation; progress reports of implement- ation process and similar and related papers. The series is arranged in packets by agency name, then by sub-division or study title.	Cut off at end of each fiscal year; hold in current files area 1 year; retire to State Archives. Earlier retirement is authorized.
73-199	MANAGEMENT REVIEW TIME DISTRIBUTION SHEETS FILES - This series consists of a record wherein payroll expenses are allocated to various jobs and projects for purposes of cost accounting and managerial control and review and consists generally of a multicolumnar sheet showing chronologically arranged payroll costs of a specific job or project. The series is maintained in two sections: one by name of employee and the other by project name.	Consider series covered by Common Standard 363 Time Distribution Sheet File: Cut off at end of each fiscal year; hold in Current Files Area 1 year or until audit is completed whichever is later; transfer to records center, hold 3 years; destroy.